

5 Unconventional Ways to Evaluate New Nonprofit Database Software

You're ready to start looking for new nonprofit database software. The key players are in place, you've identified a tentative budget, and you've conducted some initial research on potential software options.

You hope to select the best nonprofit database software for your organization because the investment in new software will be substantial. But there are many moving pieces and many variables to consider in this decision.

How will you know if a software system is the best fit for your organization?

How to find the best nonprofit database software

Most software evaluation and selection processes follow a similar path.

- Identify a need
- Outline a list of required software features
- Build a basic budget
- Develop a shortlist of options
- Contact each software vendor
- Attend a demo or webinar
- Receive proposals with pricing information
- Make a selection

You can certainly select software for your organization with this process, but you can increase your chances of finding the best software system by gathering more information. Here are five ideas on how to gather more information for your software selection process.

1. Get a demo from an organization that actively uses the software

Peer organizations offer unfiltered, honest feedback on software. This makes their feedback extremely valuable.

Request a live demo from a peer organization so you can see how the software operates in a real-world setting. A live demo from an actual user will expose workarounds, tips, and tricks for the software. These demos are generally more realistic than demos produced by the software vendor.

A demo from an organization that uses a software system day-to-day will show you what it actually takes to implement, manage, and sustain that database software platform.

2. Chat with someone who can compare multiple software platforms side-by-side

It's hard to understand all of the nuances of a software platform during an evaluation process. You may only receive a glimpse of its capabilities during demos, webinars, and Q&A sessions. Benchmarking overcomes this challenge.

Benchmarking compares software platforms side-by-side. A side-by-side comparison will show you where one platform is strong and another is weak, or vice versa.

Here are some ideas on how to compare options side-by-side.

- Look for a consultant with experience on multiple software platforms
- Search for consumer reports that compare different platforms
- Meet with peer organizations that switched software solutions recently

If you aren't evaluating multiple software systems at the same time, still compare the primary software system you're evaluating to another platform. Comparisons of two software platforms will yield insight that may not be evident if you evaluate a single software system.

3. Evaluate everything but the price, develop conclusions, and then discuss price

Pricing is important, but pricing can also cloud the software selection process.

Would you immediately rule out any software platform that doesn't align with your budget, even if that software platform matched your requirements perfectly?

If yes, you might miss an opportunity with a great system.

Consider a different approach. Pricing discussions add bias to the selection process. Take that bias out of the equation so you can focus squarely on the benefits of each software option.

Compare various software systems, make judgments as to the one that is the best fit, and then request proposals for pricing.

This method will lead to interesting discussions and questions about the value of a software platform instead of its cost.

4. Ask two internal team members to conduct simultaneous independent reviews

Direct side-by-side comparisons may not be available for the software you're evaluating (as outlined in #2 above). If that is the case, consider having two team members conduct simultaneous independent reviews of the software system or systems you're evaluating.

An independent review means that the two team members will not talk to each other during the evaluation process. The goal of this method is to reduce subjectivity in the decision making process.

The two team members should provide a recommendation at the end of their reviews.

- If the team members agree on the software system that is the best fit, then you can move forward with confidence.
- If the team members disagree on the software system that is the best fit, their disagreement prompts your organization to identify differences and focus more heavily on why a particular solution is the best fit.

While agreement between the two reviewers generates confidence that you're selecting the right nonprofit database, disagreement allows your organization to ask questions and evaluate software in greater detail. Both scenarios ultimately lead to a more informed decision.

5. Use a free trial to run a live test with the software for a specific scenario

Implementing a free trial for a short-term live test requires an investment of time and energy, but it is a foolproof way to determine if a software system is the right fit.

Request a free trial from the software vendor. Prior to purchasing the software, set up an intentional workflow for the trial period. The workflow might include a short implementation process and a trial scenario for a short-term test.

You won't be able to test the whole software during a trial, so focus on a critical use case.

Define a hypothesis or “desired state” for the trial. This definition will be your benchmark. Gather feedback from users over the duration of the trial and use the feedback to determine if the software achieves the desired benchmark.

- If the trial is positive, you have a partially functional system already in place and you can move forward confidently with the purchase.
- If the trial is negative, you can either address the negative aspects before a final purchase or determine that the software isn't a good fit.

A free trial provides practical, real-world experience with software before purchasing it.

Unconventional approaches take time, but there is an upside

Unconventional approaches to nonprofit database software selection require an investment of time and potentially money. Investing a small amount (relatively speaking) upfront could save you time and money later because the costs of selecting the wrong software are significant but the benefits of selecting the right software are extraordinary.